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Preparing your Contact Center for H1N1 and Other Disasters: A Guide for Business Continuity and Recovery

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Preparing Your Contact Center for H1N1 and Other Disasters

Executive Summary

If the H1N1 influenza, formerly known as the swine flu, strikes in your area, your contact center is at major risk of being forced to close down for anywhere from one to a few weeks. Government health agencies around the world are warning businesses, schools, colleges, nursing homes, camps and other environments that have dense populations living or working together that they need to be prepared to contain outbreaks.

Contact centers and other people-intensive businesses must be prepared to work with a skeleton staff or to close down infected locations to limit the spread of disease, while keeping their operations going. This guide outlines the steps necessary for enterprises to ensure that their contact centers are prepared for a worst-case scenario that forces the closure of their physical sites. While there is no way to prevent a pandemic or other disaster, there are ways to minimize the disruption it causes and its impact on your business.

Introduction

Contact center managers must be prepared to handle an outbreak of H1N1 influenza or some other disaster in a way that will minimize the impact on customers, employees and the enterprise. In troubled times, customers depend on their emergency services providers, government agencies, health care providers, banks, insurance companies and money managers, even more than in good times. When a pandemic like H1N1 hits, it's not particular about the populations it infects and the organizations it impacts. Contact centers must be prepared for all types of disasters, some of which may shut down their contact center(s) and others that may make it difficult for agents and other employees to reach their site. In the case of H1N1, health agencies are telling businesses to be prepared to lose 30% to 50% of their staff and to shut down operations for an indefinite period of time. Organizations that have to close down their contact center sites or offices to minimize the transfer of the disease and allow them to be disinfected cannot afford to shut down all of their operations. This white paper gives contact center and emergency services managers the help they need to prepare for and minimize the impact of pandemics and other types of disasters on their operating environments.

Design the Contact Center Business Continuity Process

The first step in preparing for a disaster is to build a disaster recovery (DR)/business continuity (BC) plan to keep your contact center operating during a disaster. The strategy you choose will depend on your technical capabilities

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and resiliency, number of sites and their geographical dispersion, the percentage of work that can be deferred in the short run without serious business ramifications and customer dissatisfaction, and how much you are willing to spend to upgrade your capabilities. Here are a variety of ways to prepare your contact center and limit the negative impact and cost of disasters:

- Have geographically dispersed locations, if possible. Set up business continuity routing plans to move calls from an impacted site to its back-up. Have back-up overtime requirements in place that are agreed upon by the staff.
- Invest in contact center infrastructure that is resilient and comes with full back-up capabilities.
- Establish a business continuity plan with your carrier(s) that allows you to easily alter your routing scheme.
- Be prepared to use self-service solutions as your primary customer interaction point for as long as half a day. This is not ideal, but if it becomes necessary, you should have an IVR script or voice user interface ready to be implemented, as well as a modified and easily updated Web self-service environment. (Build these environments and hope you'll never have to use them.)
- If your contact center technology supports work-at-home agents, assign 20% of agents to be DR staff. Implement the technology needed in their homes and train them to use it. Ensure that they have necessary bandwidth to handle calls and other types of customer interactions. Make sure your organization has capacity on its network to handle this capacity while supporting all of the other groups that will be working at home. (The only way to validate this is to run a full business continuity test.)
- If work-at-home is not an option, find an outsourcer in a different geography that can provide back-up agents and technology on short notice. The outsourcer's agents must be trained and have your systems and processes available to them. (To ensure that they are ready, they should be tested every quarter.) If you're hit by the H1N1 flu, it will not help to have a back-up contact center site in the same region. You will need fully trained people and supporting technology to fill in for your sick and unavailable employees. Keep in mind that even if your staff are not sick, their family members may be ill, preventing them from being able to work.

Designate Business Continuity and Disaster Recovery Staff Responsibilities

All contact centers should have primary and back-up BC and DR managers. These managers should be involved in setting up, maintaining, testing and when necessary, deploying the plan. It is a good idea to select managers who live in geographically separate locations. Make sure that all employees know who these managers are and how to reach them in an emergency.

In addition, each staff member should be given a specific disaster assignment. Supervisors may be responsible for calling each of their team members to determine if they are available to work. Managers may be responsible for checking on the status of supervisors and/or checking to make sure that the correct messages to customers have been implemented. Agents may be responsible for calling a certain number or checking a website to determine if they should use their work-at-home equipment or come into the office. Staff members should know exactly what is expected of them.

Communication is the Key

Experience has proven that communication is the key to business continuity when disaster strikes. Contact centers, emergency service providers and customer service organizations must be prepared to communicate with their employees and customers. Here are a few best practices for addressing internal staff communications:

1. Compile a list of employee phone numbers and email addresses. Establish an automated process to keep the list updated on a weekly basis. This will allow you to reach your staff proactively if they need to stay out of the office, go to a different location or return to the office.
2. Invest in an interactive voice response (IVR) system that can be loaded remotely with staff phone numbers. Have a disaster recovery script ready to go.
3. Set up a website or message system for agents to call to find out about the status of operations and what is expected of them.
4. Ensure that all staff members, full-time and contract staff know where to go for current information.

It is also essential to have an external communications plan to keep your customers informed about your organization and to reassure them that you are

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there for them, even if service is slower than normal. Customers who hear about the disaster on the news will understand and tolerate the slow service, as long as they know what to expect. Here are a few proven tips for keeping your customers satisfied, even in challenging times:

1. Keep information as current as possible and accurately set expectations.
2. Reassure customers that your company or institution is there for them.
3. Be prepared to coordinate with local authorities and emergency aid groups.
4. Proactively notify the media so that they don't make a bigger issue than necessary out of your challenges, further alarming customers.

Systems and Network Requirements

Achieving your DR/BC objectives requires flexible contact center solutions that can be modified remotely. Essential elements of the infrastructure include Web-based self-service, inbound/outbound IVR, and an automatic call distributor (ACD) with flexible voice messages and prompter. Additionally, management must have a disaster campaign ready for the IVR, ACD messaging recorded, special ACD routing set up, and special Web pages ready to be put into production.

Contact centers use many systems and applications to provide a consistently outstanding customer experience. During a disaster, management must shift their focus from quality of service to handling as many customer interactions as possible on a timely basis. Many activities can be suspended for a relatively brief period of time without a major impact on service, including quality assurance, workforce management, welcome calls, retention activities and even collections. This also means that supporting staff should be cross-trained to handle customer inquiries and transactions, as this is the priority during disasters. It's also very important to ensure that the recording solutions continue to operate fully, in order to avoid unnecessary lawsuits. Contact center and DR/BC managers should formulate a checklist of all system changes that need to be implemented during a disaster. See Figure 1.

Figure 1: Contact Center Business Continuity Systems Checklist

- Implement internal and external communications systems
- Contact carriers and change call allocations
- Change ACD voice messages
- Alter ACD prompter
- Change Web self-service applications
- Implement outbound IVR campaigns (if appropriate)
- Change ACD routing
- Bring up back-up sites (outsourcers) and systems (if available and necessary)
- Enable work-at-home agents
- Test recording systems

Preparation and Testing

In a recent study on contact center disaster recovery, DMG found that only 36.7% of companies were confident that they could operate without serious impact on service quality and the customer experience during a disaster. This finding is because the majority of contact centers either do not have a DR and BC plan or are not keeping it up to date. Only 4.7% of companies test their DR and BC plans on a monthly basis. This leaves 95.3% of contact centers at risk of a major meltdown in an emergency.

While disasters such as fires or floods may seem to be remote possibilities, the H1N1 influenza is expected to hit a large number of people and organizations. You can limit the degree to which your business is negatively impacted by developing and testing your BC plans. Here are a few proven techniques to reduce the impact of disasters on your contact center:

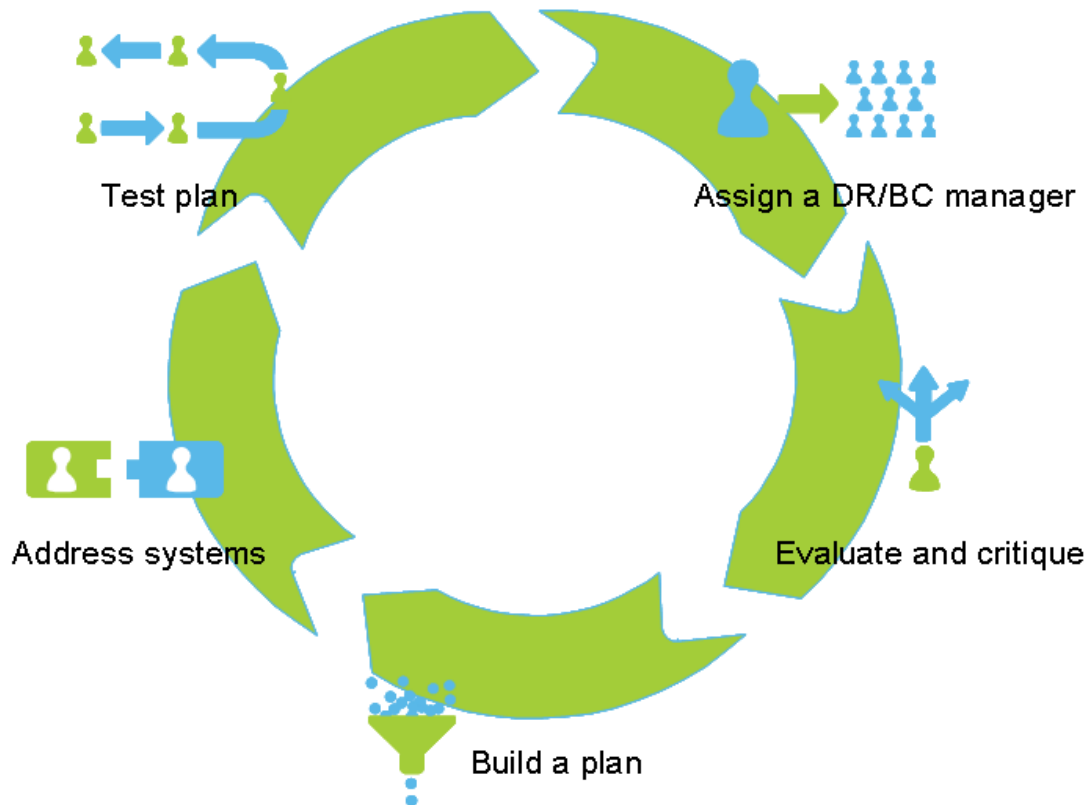
1. Assign a DR/BC manager and back-up. Rotate these roles every six months to train all managers in these responsibilities. (The contact center manager should be responsible for contacting the DR/BC manager to

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- make sure that they are available. Additionally, the primary and back-up DR/BC managers should be responsible for contacting each other.)
2. Evaluate and critique the potential impact of a disaster on your contact center and build a plan that addresses all issues. Keep in mind that there are many types of disasters; some impact only a small number of agents, while others can close down an entire center.
 3. Prepare your contact center staff for a disaster by putting them through a training class that explains your disaster plans and what is expected of each individual.
 4. Test your systems and plans. Systems should be tested on a quarterly basis. The overall BC plan should be tested every six months. While this may sound excessive, keep in mind that most contact centers have a significant amount of agent turnover and that people do not remember skills and procedures that they do not use.

Figure 2 shows the standard steps in a contact center business continuity plan.

Figure 2: Contact Center Business Continuity Process



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Testing also mitigates fears. People in many countries all over the world are highly concerned about the H1N1 virus. You can reassure your employees by letting them know that you are addressing their best interests, as well as the needs of the enterprise. Knowing that your business has a plan to keep employees healthy and ensure that they can be available to take care of sick family members will lessen their concerns.

Lastly, it would be ideal for a certain number of staff members, along with their families, to obtain anti-viral drugs such as Tamiflu. This will ensure that they are healthy even when other staff members are not. However, before asking any of your employees to take a drug, speak with your legal department and health care officials.

Final Thoughts

Nobody likes to think about disasters, but whether they are “acts of God,” man-made, or a pandemic like H1N1, they happen. Not every company will be hit by a severe flu outbreak, but all contact centers have to be prepared. Contact center managers must have disaster recovery and business continuity plans that can keep their operation running, albeit at a lower service level, if service disruption occurs. Managers cannot prevent disasters from happening, but they can limit the damage to the enterprise and its customers.

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About Nortel

Nortel delivers communications capabilities that make the promise of Business Made Simple a reality for our customers. Our next-generation technologies, for both service provider and enterprise networks, support multimedia and business-critical applications. Nortel's technologies are designed to help eliminate today's barriers to efficiency, speed and performance by simplifying networks and connecting people to the information they need, when they need it. For more information, visit Nortel on the Web at www.nortel.com. For the latest Nortel news, visit www.nortel.com/news.

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